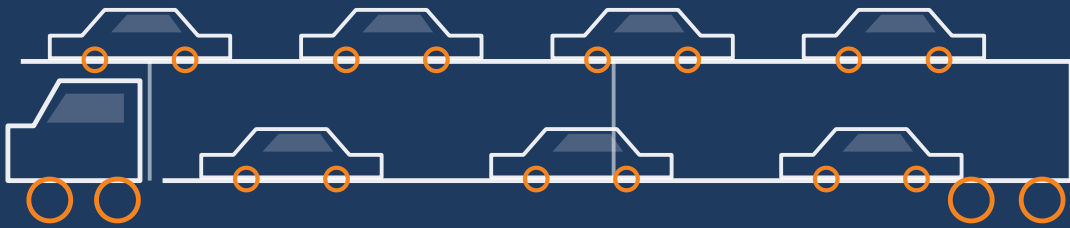


INDUSTRY GUIDE

United States Car Shipping Industry 2026

Market dynamics, regulatory evolution, and operational benchmarks for carriers, brokers, dealerships, and fleet buyers.



\$45.78B

U.S. automotive logistics
value by late 2026

\$1.779

Record non-fuel
operating cost per mile

97%

Of carriers run fewer than
20 trucks

2.09M

Motor carriers registered
with the FMCSA

Executive summary

The 2026 United States car shipping industry is operating in a landscape of "cautious stabilization" following the volatility of the early 2020s. While the broader automotive logistics market is projected to reach \$61,733.9 million by 2030, the immediate term is defined by a "shipper's market" characterized by excess capacity and compressed carrier margins.^[2]

Key developments for 2026 include the full digitalization of Commercial Driver's License (CDL) medical certifications, the integration of fentanyl into mandatory Department of Transportation (DOT) drug panels, and a significant regulatory pivot for electric vehicle battery safety and weight allowances.^{[1],[7]}

What is inside

1 Market valuation and macroeconomic outlook

Segment values, growth rates, and brokerage concentration

2 Operational economic benchmarks

Per-mile rate tiers and the true cost of deadhead miles

3 Fleet infrastructure and fragmentation

Carrier counts, fleet sizes, and geographic density

4 The EV logistical transition

New UN codes, state of charge limits, and weight allowances

5 Regulatory evolution and compliance

Medical certification, drug panels, and CDL enforcement

6 Seasonal tides and the snowbird economy

Migration windows, corridor behavior, and Canadian demand

7 Performance benchmarks and claims standards

On-Time In-Full (OTIF) targets, damage ratios, and average claim values

8 Technology ROI and AI integration

Adoption rates and documented operating gains

9 Critical industry challenges

Driver supply, verdicts, insurance, and cargo theft

10 Strategic forecast for 2026 and 2027

Sales outlook, EV resale surge, and stakeholder guidance

Market valuation and macroeconomic outlook

The U.S. remains the primary driver of North American automotive logistics, accounting for 17.1% of the global market share.^[1]

\$39.42B

U.S. automotive logistics value in 2024

7.8%

Compound annual growth rate

\$758.5M

Auto transport brokerage segment in 2026

41%

Of global shipments held by the top 10 brokers

- **U.S. automotive logistics.** Valued at \$39,422.4 million in 2024, it is expanding at a Compound Annual Growth Rate (CAGR) of 7.8% and is expected to hit approximately \$45,780 million by late 2026.^[1]
- **Auto transport brokerage.** This segment is projected to reach \$758.54 million in 2026, with a long-term CAGR of 8.13% through 2035.^[3]
- **Market concentration.** The brokerage sector remains moderately fragmented, and the top 10 brokers currently manage 41% of total global shipments.^[3]
- **Global vehicle shipping.** The worldwide market is expected to reach \$46.90 billion in 2026, fueled by international trade and e-commerce growth.

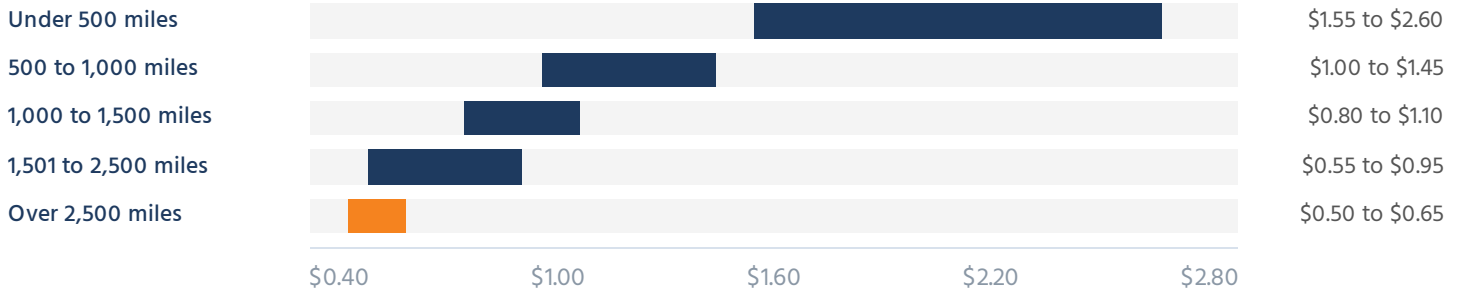
Major brokerage performance, 2025 to 2026^{[3],[21]}

Rank	Company	Market share or performance	Key strategy
1	ShipYourCarNow	Inc. 5000 honoree, three years running	20 years of service, instant quotes, and in-house claims handling
2	Easy Auto Ship	12% domestic share	82% on-time delivery rate
3	Montway Auto Transport	More than 1M customers served	Specialized concierge and GPS tracking
4	AmeriFreight	Top 5% carrier vetting	Gap insurance coverage under the AFTA PLAN
5	LMR Auto Transport	14% North American share	78% fleet utilization

Operational economic benchmarks

Carriers in 2026 face a cost-squeeze where non-fuel operating costs have reached a record high of \$1.779 per mile.^[5]

Open carrier rate compression as distance increases



Rate per mile falls as route length grows, which is why long-haul quotes look cheaper per mile while carrying a higher total price.

Per-mile rate tiers, 2026 forecast^[6]

Distance bracket	Open carrier, average rate per mile	Enclosed carrier, average rate per mile	Total estimate, sedan
Under 500 miles	\$1.55 to \$2.60	\$2.10 to \$2.50	\$600 to \$930
500 to 1,000 miles	\$1.00 to \$1.45	\$1.13 to \$1.53	\$800 to \$1,250
1,000 to 1,500 miles	\$0.80 to \$1.10	\$0.93 to \$1.13	\$1,050 to \$1,510
1,501 to 2,500 miles	\$0.55 to \$0.95	\$0.66 to \$1.03	\$1,200 to \$1,850
Over 2,500 miles	\$0.50 to \$0.65	\$0.48 to \$0.70	\$1,350 to \$1,925

The cost of deadhead and inefficiency

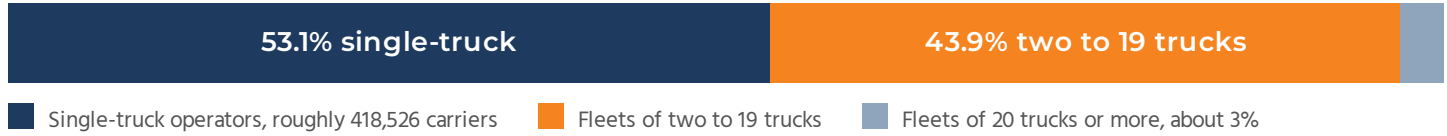
Deadhead miles, meaning empty repositioning, remain a critical drain on profitability.

- **Industry average.** Typical trucking companies operate with 15% to 25% deadhead miles.
- **Financial impact.** A typical deadhead mile costs \$1.50 to \$2.50 in variable expenses. For a carrier running 500,000 annual miles, a 20% deadhead rate results in a pure loss of \$150,000 to \$250,000.
- **Regional variance.** The Northeast reclaimed its spot as the most expensive region for operations in recent cycles, while the Southeast maintains the highest costs for driver benefits.

Fleet infrastructure and fragmentation

The U.S. motor carrier base is characterized by extreme fragmentation, which enhances the necessity of brokers for load matching.

How the registered carrier base breaks down by fleet size

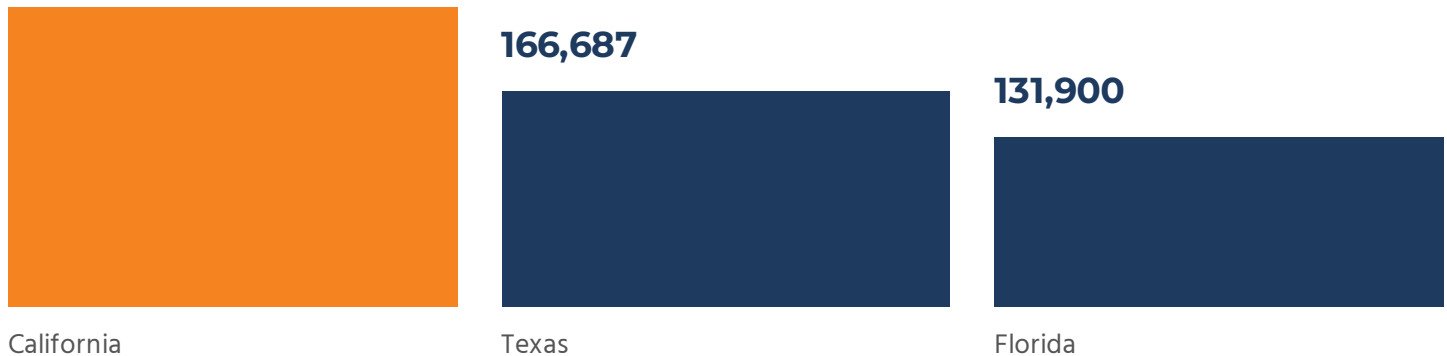


97% of carriers operate fleets with fewer than 20 trucks, which is why load matching through brokers remains structurally necessary.

- **Registered carriers.** As of mid-2025, there are approximately 2.09 million motor carriers registered with the Federal Motor Carrier Safety Administration (FMCSA).
- **Fleet size distribution.** 97% of carriers operate fleets with fewer than 20 trucks. Specifically, 53.1%, or roughly 418,526 carriers, operate only a single truck.
- **Active equipment.** Roughly 580,000 carriers own or lease at least one truck-tractor.

Registered motor carriers in the three densest states

232,570



The EV logistical transition

2026 marks a regulatory turning point for the shipment of battery electric vehicles.

New dangerous goods classifications, effective January 1, 2026

To mitigate thermal runaway risks, the United Nations (UN) has introduced specific codes for lithium-ion and sodium-ion powered vehicles.^{[7],[8]}

UN 3556

Vehicle, lithium-ion battery-powered

Mandatory for all passenger electric vehicles

UN 3558

Vehicle, sodium-ion battery-powered

Applies to emerging sodium-ion battery vehicles

2026 safety requirements^{[7],[9]}

Category	Requirement	Applies to	Limit or allowance	Status
State of charge	Maximum state of charge for air transit	Vehicles with batteries over 100 watt-hours (Wh)	30% or lower	Mandatory
State of charge	Recommended state of charge for land and maritime transport	Vehicles with batteries over 100 Wh	20% to 50%	Highly recommended
Weight allowance	Additional gross vehicle weight allowance for zero-emission vehicles	Federal highways, including California, Texas, and Florida	Plus 2,000 lbs	Permitted
Gross vehicle weight	Updated maximum gross vehicle weight	Federal highways	82,000 lbs, up from 80,000 lbs	Effective 2026

Why the charge limits exist

Air shipments require a state of charge at or below 30% for any vehicle carrying a battery over 100 Wh, which reduces thermal runaway risk. On land and sea, holding the pack between 20% and 50% is treated as industry best practice for both safety and battery stability.

Regulatory evolution and compliance

The DOT and FMCSA are shifting toward a data-driven, electronic future.

January 10, 2026

Paper medical certificates expire

The temporary waiver for paper medical certificates ends. Carriers must verify all driver medical status exclusively through electronic Motor Vehicle Records.^[1]

Early 2026

Fentanyl joins the mandatory DOT drug panel

Fentanyl and norfentanyl are expected to be added to the mandatory DOT drug testing panel for all safety-sensitive employees.^{[1][10]}

Ongoing through 2026

Safety fitness moves to continuous scoring

The FMCSA is transitioning to a more continuous, data-driven safety rating system that uses inspection, violation, and crash data for oversight rather than periodic audits.^[10]

Ongoing through 2026

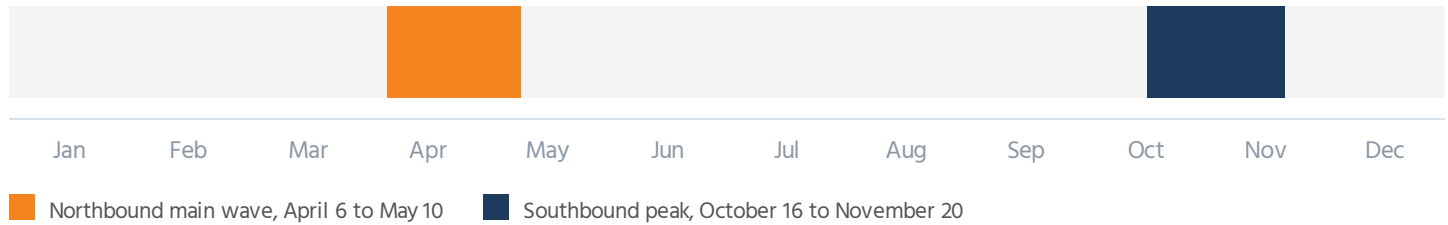
Non-domiciled CDL enforcement tightens

Stricter enforcement of non-domiciled CDL rules could impact an estimated 200,000 drivers who may lose eligibility to renew, which would tighten capacity further.

Seasonal tides and the 2026 snowbird economy

Seasonal migration remains the primary driver of pricing volatility on North to South corridors.

The two migration windows that set pricing across the year



- **Northbound peaks.** The main wave occurs between April 6 and May 10, 2026. This is the busiest month of the year, typically seeing a 10% to 20% price surge compared to fall rates.
- **Southbound peaks.** The highest demand occurs between October 16 and November 20.

How the three major corridors behave

I-95, East Coast

Highest frequency and departure volume of any corridor. Urban pickup restrictions in New York City and South Florida can extend timelines.

Watch for: Extended pickup windows in dense urban zones.

I-75, Midwest

Consistent capacity between the Ohio Valley and Florida's Gulf Coast throughout the season.

Watch for: Steady availability and fewer rate spikes.

I-10 and I-17, Southwest

Key lanes for Arizona and Southern California. Fewer carriers serve remote desert locations, which leads to higher localized rates.

Watch for: Premium pricing outside major metros.

The Canadian factor

Canadian snowbird participation is under pressure in 2026, with a drop of over 30% in U.S. travel intent among retirees.^[13]

Drivers: Rising Florida property insurance, a weak Canadian dollar, and complex biometric entry.

Performance benchmarks and claims standards

The standard for excellent service has shifted as automotive original equipment manufacturers (OEMs) and luxury clients demand near-perfect execution.

99.9%

On-time, in-full reliability now demanded by automotive manufacturers

0.50%

Industry average damaged freight ratio

0.19%

Damage rate reported by carriers using elite trailer systems

\$3,706

Average estimate for a drivable front-end claim

- **OTIF reliability.** Automotive manufacturers now demand 99.9% on-time, in-full reliability for production-critical deliveries.
- **Claims ratios.** The industry average for damaged freight is approximately 0.50%.^[7]
- **Elite performance.** Carriers using high-end trailer systems such as Cottrell or Wally-Mo report damage rates as low as 0.19% to 0.22%.^[6]
- **Average claim amount.** The average estimate for a drivable front-end claim reached \$3,706, a 39.4% increase since 2019 due to the complexity of modern sensors and cameras.

Why claim values keep climbing

Bumpers and fascias now house radar units, parking sensors, and camera arrays. A cosmetic looking front-end contact triggers sensor recalibration, which is what pushed the average claim up 39.4% since 2019.

Technology ROI and AI integration

Artificial intelligence (AI) is no longer a luxury. It has become an essential tool for maintaining margins in 2026.

Adoption and documented benefit by technology^{[20],[3]}

Technology	Adoption rate	Documented benefit
Cloud-based Transportation Management System (TMS)	64.3% market share	14% operational efficiency gain
Mobile booking apps	78% of customers	48% increase in adoption
Predictive maintenance	Emerging	Up to 35% reduction in equipment downtime

Critical industry challenges

Four pressures are shaping cost and capacity across the sector this year.

Driver shortage

The shortfall is projected to exceed 100,000 drivers by late 2026. Median driver age sits at 46, and the aging workforce continues to strain capacity.

Impact: Higher freight rates and tighter availability.

Nuclear verdicts

Jury awards exceeding \$100 million in truck accident cases have become a recurring feature, and liability premiums are rising in double digits in some quarters.^[5]

Impact: Increased insurance and legal costs for carriers.

Insurance costs

Premiums are up 36% over the past eight years, and early 2025 renewals increased nearly 10% on their own.^[5]

Impact: Ongoing margin pressure across the industry.

Cargo theft

Cyber-facilitated theft rose 27% in 2024, with criminals using AI to manipulate FMCSA data.

Impact: Elevated fraud risk and security costs.

Strategic forecast for 2026 and 2027

Volume softens at the front of the market while the secondary EV channel expands sharply.

New vehicle sales

New vehicle demand is softening slightly in 2026, which may reduce transport volume from manufacturers and dealerships. The U.S. new vehicle market is expected to experience a modest slowdown after stronger post-pandemic recovery years.

15.89M

Projected U.S. new vehicle sales in 2026

2.5%

Decline compared with 2025

Used vehicle inventory

Tight inventory levels may limit the volume of used vehicles entering transport networks. Although used vehicle demand remains stable, constrained supply continues to affect wholesale and retail vehicle movement.

1%

Expected decline in used vehicle sales

Tight

Inventory levels remain constrained nationwide

EV resale surge

A wave of off-lease EVs will significantly increase electric vehicle transport activity. As early EV leases mature, large volumes of vehicles are entering secondary markets, auctions, and dealer redistribution channels.

300,000

Off-lease EV returns projected in 2026

200%

Year-over-year increase

Stakeholder guidance

Profitability and operational efficiency will matter more than pure volume growth. Industry leaders should focus on operational optimization, regulatory compliance, and technology adoption to remain competitive.

Prioritize margin-building strategies over volume growth

Invest in AI-driven route density optimization

Comply with the January 10 electronic medical certification mandate

Reduce deadhead losses and operational risk

Works cited

No.	Source	Title	URL
1	Grand View Research	The United States Automotive Logistics Market Size & Outlook, 2033	grandviewresearch.com/horizon/outlook/automotive-logistics-market/united-states
2	HUB International	2026 US Transportation Outlook	hubinternational.com/en-us/insights/outlook/2026/transportation
3	Industry Research	Auto Transport Brokerage Market Size, Share, Growth, and Industry Analysis, By Type, By Application, Regional Insights and Forecast to 2035	industryresearch.biz/market-reports/auto-transport-brokerage-market-112635
4	Data Insights Market	Vehicle Shipping Service Market Demand Dynamics: Insights 2026-2034	datainsightsmarket.com/reports/vehicle-shipping-service-129922
5	Rush Truck Centers	Top Challenges the Trucking Industry Is Facing as We Head into 2026	rushtruckcenters.com/blog/2026/1/top-challenges-the-trucking-industry-is-facing-as-we-head-into-2026
6	iDrive Certified	Average Car Shipping Cost: 2026 Prices, Per-Mile, Factors	idrivecertified.com/blog/average-car-shipping-cost
7	Flexport	2025 and 2026 Regulatory Changes for Lithium-Ion and Sodium-Ion Batteries: Navigating Dangerous Goods Updates	flexport.com/blog/2025-and-2026-regulatory-changes-for-lithium-ion-and-sodium-ion-batteries
8	UNI Customs Consulting	UN Code 2026: New Rules for Lithium Battery Vehicles	unicustomsconsulting.com/en/new-un-code-regulations-for-lithium-battery-vehicles-2026-what-should-businesses-do
9	WC Shipping	Complete Guide To EV Shipping: Cost, Methods & Safety In 2025	wcshipping.com/blog/complete-guide-to-ev-shipping-cost-methods-safety-in-2025
10	J. J. Keller Encompass	What Does 2026 Have in Store for Fleet Managers?	eld.kellerencompass.com/resources/blog/2025-blogs/2026-regulatory-outlook
11	DISA	2026 DOT Compliance Updates: What Motor Carriers Need to Know	disa.com/news/2026-dot-compliance-updates-for-motor-carriers

No.	Source	Title	URL
12	CBC News	Canadian Snowbirds Say U.S. Politics Are Ruffling Feathers and Changing Their Migration Patterns	cbc.ca/news/world/canadian-snowbirds-rethinking-us-travel-plans-9.6980001
13	Maclean's	Canadian Snowbirds Are Giving Up on the U.S.	macleans.ca/society/canadian-snowbirds-are-giving-up-on-the-u-s
14	The Seeker	Fewer Canadian Snowbirds Are Heading to Florida This Year	theseeker.ca/2025/12/fewer-canadian-snowbirds-are-heading-to-florida-this-year
15	James Group International	Why 99.9% On Time Delivery Matters More Than Ever: Transportation Challenges Facing Automotive OEMs in 2026	jamesgroupintl.com/newsroom/articles/1156/why-99-9-on-time-delivery-matters-more-than-ever-transportation-challenges-faci
16	Fleet Rabbit	Car Carrier Trailers Breakdown: Cottrell CX-09 vs. Wally-Mo Haulers	fleetrabbit.com/blogs/post/car-carrier-trailers-cottrell-wally-mo
17	Van Kam Freightways Ltd.	A Guide to Finding the Best LTL Freight Trucking Company for Your Business in BC and Alberta	vankam.com/portal/ltl-freight-shipping/a-guide-to-finding-the-best-ltl-freight-trucking-company-for-your-business-in-bc-and-alberta
18	Insurify	Why Is Car Insurance So Expensive? (2026)	insurify.com/car-insurance/why-your-car-insurance-costs-are-so-high
19	Fleet Rabbit	Last-Mile Delivery Optimization Trends for 2026	fleetrabbit.com/blogs/post/last-mile-delivery-trends-2026
20	GM Insights	Digital Freight Brokerage Market Size & Share 2026-2035	gminsights.com/industry-analysis/digital-freight-brokerage-market
21	ShipYourCarNow	Why Choose ShipYourCarNow	shipyourcarnow.com/why-us

ShipYourCarNow

2026 United States Car Shipping Industry: Market Dynamics, Regulatory Evolution, and Operational Benchmarks.

This edition published September 13, 2026. Compiled from 20 external sources accessed January 19, 2026. Figures reflect forecasts and reported benchmarks available at the time the sources were consulted.

